lanage Data Sync

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ome of CollaborateMD's largest clients are multi-state healthcare practices or billing service providers *i*th separate customers under their main accounts. This setup enables them to maintain distinct patient, laim, and payment information for each of their individual Customers. Having these separate customers lso requires users to input setup data such as Referring Providers, Facilities, Codes (procedure codes, fee chedules, diagnosis codes, remittance codes, revenue codes, etc.), and Payers independently for each ustomer, resulting in a significant amount of setup work.

o simplify this manual process into a fully automated solution, we created our Data Sync feature. This new apability allows clients to automatically sync their data with multiple customers whenever a change is nade. You no longer need to manually add new codes, payers, and other details for each individual ustomer. Instead, simply enable the Data Sync feature and let it do it for you. Start automating this rocess and enhance your productivity within CMD today!

⁽¹⁾ Please note that this feature will replace the Data Copy, streamlining the process of copying important data while offering a more cost-effective solution for customers.

Inable and Configure Data Sync

¹ you're the Auth Rep, follow the steps below to enable, configure, or disable Data Sync:

- 1. Select Account Administration > Services.
- 2. Click the **button** next to Data Sync.
- 3. The Enable Data Sync box enables or disables this service.
- 4. Under Synchronization Options:
 - 1. Click Add.
 - 2. Use the "Sync From Customer" search field to select the customer from which to sync the data
 - 3. Use the "Sync To Customers" checkbox(es) to select the Customer(s) to which to transfer the data.

The "*Sync From*" customer is the primary source file from which the data will be copied. The "*Sync To*" customer(s) are the ones whose data will be overwritten with the copied information.

4. Click save.

Cust	omer Gro	uping Configuration		
	From Custome DEMO (#100			Q
Sync 1	o Customers	2 out of 342 selected		
	Customer #	Name	Status	
	10030308	A REALLY GREAT OFFICE	Open	
\checkmark	10024354	ACME MEDICAL	Open	
	10026934	KUTE AUDITATION ATTRACT TOP ACCOUNT	Open	
	10020139	AND INTERNET TOP ACCOUNT	Open	
	10029221	ADVANCED AND APPENDED THE ACCOUNT	Open	
	10027782	AND DR. ATOMAC TOT ACCOUNT	Open	
	10024300	AND DR. NUMBER TO ACCOUNT	Open	
	10025712	and these sectors as these for the	Open	–
		Sa	ave Ca	ancel

You can also have multiple "Sync From" customers synchronized to copy data to different "Sync To" customers.

Synchronization Options From CMD DEMO (#10006410) to 4 other customers	🖉 Edit 🔋
From ACME MEDICAL (#10024058) to 2 other customers + Add	n Edit 🛛 🖷
 Only create items that don't exist Items that are already in a Sync To customer w Overwrite all changes 	on't be changed. ill be replaced with the items in the Sync From customer.

- 5. Use the "Only create items that don't exist" radio button (Defaulted option).
 - 1. Selecting this option will ensure that the existing items in the 'Sync To'' customer are not modified.
- 6. Use the "Overwrite all changes" radio button.
 - 1. Selecting this option will overwrite existing items in the 'Sync To" customer and replace them with those in the "Sync From" customer.

Important: We recommend selecting the "**Only create items that don't exist**" option, as this will not alter any existing records. It will only update new ones moving forward, ensuring that nothing is accidentally overwritten. Billing Services that plan to maintain all of their configurations and manage all their lists from one customer (the *Sync From* customer) without making any changes to individual customers (other than Situational

Modifiers or Provider BIlling Options, which are not part of Data Sync) can use the "**Overwrite all changes**" option to ensure that all configurations exactly match the*Sync From* customer. It's also important to note that**there is no way to undo this action**once the data has been overwritten.

5. Under Data Options:

- 1. Use the radio button to select thedata types to copy.
 - 1. Codes You can select to syncProcedure, Diagnosis, ICD Procedure, Revenue, Remittance and Adjustment codes. You can also select to syncFee Schedules. <u>Please note that existing</u> <u>situational modifiers will not be copied to procedure codes</u>.
 - 2. Facilities Select this option to sync any updates to the Facility section.
 - 3. Referring Providers Select this option to sync any updates to the Facility section.
 - 4. **Payers** Select this option to sync any updates to the Facility section <u>Please note that</u> <u>existing provider billing options will not be copied to payers</u>.

▲ Data Sync does not include rendering/attending providers, billing providers, claims, financial data, pending information (appts., etc.), notes (e.g. patient notes, claim notes, etc.), or patient balance.

Data Sync Configuration for Account	#462134 - CollaborateMD	
From CMD DEMO - DEV (#10006402) to 2 other customers		/ Edit
+ Add Only create items that don't exist Items that are already in a Sync To customer Overwrite all changes Items that are already in a Sync To customer		ync From customer.
Data Options		
 Codes Procedure Situational modifiers will not be copied. Diagnosis ICD Procedure Revenue Remittance Adjustment Fee Schedules Facilities Referring Providers Payers Payer billing options will not be copied. 		
		Save Cancel

6. Click Save.

When selecting the Data Sync option to 'Overwrite all changes," any time a record is updated in the "Sync From" customer, you will receive a pop-up notification. This pop-up will inform you that the data will be synchronized and will also indicate the number of customers that will be synced.

PF.	o you want to proceed with saving? fiew Customers Don't show me this warning again	Data Sync will synchronize	all changes into 4 customers.
ew Customers		Do you want to proceed wit	th saving?
	Don't show me this warning again	/iew Customers	
Don't show me this warning again		Don't show me this war	ning again

Edit A Data Sync

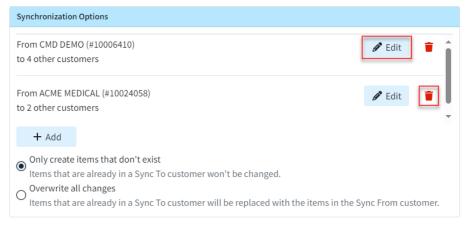
¹ you're the Auth Rep, follow the steps below to edit an existing Data Sync:

1. Select Account Administration > Services.

2. Click the **button** next to Data Sync.

3. Under Synchronization Options:

- 1. Click **Edit** to make any updates or changes to the 'Sync From'' or ''Sync To'' customers within the customer grouping configuration, then click **Save**.
- 2. To delete a specific synchronization option, click the delete **trash can icon**) option.



4. Update any desired Data Options.

5. Click Save.

Want to copy data to customers in a different CMD account? Visit ourRequest a Data Copy Help Article for more information.